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*A project of the Tides Center*

## **AFRICA GRANTMAKERS' AFFINITY GROUP (AGAG)**

### **STRATEGIC PLAN FOR 2014 – 2016**

#### **The Evolving African Landscape & Unique Role for Philanthropy**

AGAG recognizes that changes in philanthropy and in the social, political, cultural, and economic climate in Africa are dynamic and part of an evolving landscape. There are many reasons for optimism. Africa has more than 60% of the world's arable land with a wealth of natural resources and is home to some of the world's fastest growing economies. It is projected that by 2030 middle class growth will push consumer spending to more than \$2 trillion. Advances in telecommunication have increased the access to and use of mobile technology. There is no denying the growth of democracy in Africa, which today has the most countries with democratic systems since the 1960s and population growth has increased the work force (15-64) by 25% over the past decade.

Accompanying these dynamic and impressive gains are also many challenges still facing African communities. Much work remains to be done. Africa has not escaped the heightened security concerns from terrorist threats or increases in economic inequality. High unemployment rates among both educated and unskilled youth fuel political instability. In new and established democratic countries power struggles impede progress to build transparent governance, develop effective public policy, and supply adequate public goods. Limited access to clean water and sanitation exacerbate the double burden of high rates of communicable and non-communicable diseases on health care systems.

American philanthropy has a long history of supporting efforts for positive change in Africa in areas ranging from agriculture, education, and civil society to democracy, health, and human rights. Changes in the philanthropy landscape and the emergence of new actors and approaches open up more opportunities to make a lasting impact. Grants are increasingly seen as just one in a mixture of funding tools that include impact investing and social entrepreneurship. Fundraising through social media and "crowd funding" leverage individual contributions on a large scale. The characteristic flexibility of private funders enables them to play a unique role and act in a timely, robust, and responsive fashion that can amplify the important gains and opportunities across the continent.

#### **AGAG's Commitment & Future Strategic Direction**

Against this backdrop of positive change and continuing challenges facing both African communities and Africa funders, AGAG enthusiastically took this moment to prepare for its next phase of important work (2014 – 2016) by refreshing, redefining, and recommitting to its vision, mission, and values. With the generous input of more than twenty key stakeholder interviewees as well as the thoughtful work of the staff and Steering Committee, this Strategic Refresh also re-imagines AGAG's goals and objectives for the next three years.

This Strategic Refresh has been created not as a static plan, but as an adaptive strategy – a map of the terrain and navigational tool for the next three years of AGAG's work. As such, this Strategic

Refresh seeks to better position AGAG – its members, Steering Committee, staff, and key partners - to effectively catalyze a deepening and strengthening of the philanthropic response to some of the pressing needs and exciting opportunities facing Africa and its people.

- AGAG will endeavor to grow and strengthen the pool of philanthropic resources to Africa by working with both current and new partners and stakeholders to identify critical trends, sound strategies, and key points of leverage and opportunity.
- AGAG will continue to convene a unique and diverse set of funders and experts across a broad array of issues -- providing time, space and thought leadership to help build a larger and stronger network of increasingly informed, knowledgeable and connected funders.
- AGAG will take advantage of emerging opportunities in other mission-driven, creative, and innovative ways to help funders forge productive partnerships and use effective funding strategies in support of Africa and its people.

### **Vision**

AGAG envisions a world in which African communities achieve their full potential.

### **Mission**

AGAG promotes robust, effective, and responsive philanthropy benefiting African communities.

### **Operating Statement**

AGAG serves the philanthropic community by catalyzing learning, networking, and strategic collaboration on a full range of issues and trends related to funding at all levels in Africa.

### **Core Values**

AGAG strives to operate with the following core values:

- **Diversity & Respect:** AGAG values and is committed to fostering a diversity of constructive experiences, opinions, and approaches. It encourages new voices and ideas from current and potential members and the full range of philanthropic and other stakeholders working in support of positive change in Africa.
- **Accountability:** AGAG holds itself to a high standard of ethical conduct and accountability and encourages the same of its members, stakeholders, and the field of Africa philanthropy.
- **Knowledge and Learning:** AGAG values knowledge, learning, candor, and critical thinking and believes that gathering, curating, and sharing knowledge are essential activities in effective funding.
- **Collaboration and Partnership:** AGAG is committed to building collaborations and partnerships to advance its vision, mission, and goals.

### **Goals, Objectives, and Strategies**

Goal I. Advocate for sustained and increased philanthropy dedicated to Africa at all levels.

Goal II. Explore and educate funders on methods of effective funding approaches and trends in current philanthropy to Africa.

Goal III. Ensure AGAG's organizational sustainability, stability, and sound management to successfully achieve its vision, mission, values, and goals.

**Goal I. Advocate for sustained and increased philanthropy dedicated to Africa at all levels.**

Objective: Assist in maintaining current levels of private funding, seek to identify opportunities to increase funding, and continue to support efforts to maximize the positive impact of philanthropy dedicated to Africa.

Strategies:

- Strengthen the sense of community, shared commitment, and urgency among current and potential new private funders to create a robust philanthropic response to issues affecting communities in Africa at all levels.
- Deepen knowledge and learning among current Africa funders about approaches and perspectives to successful funding in Africa and disseminate this knowledge and learning to new and potential philanthropic actors in the field.
- Promote greater and more effective partnerships and collaborations among current and potential private Africa funders.
- Support funders in identifying tools that make the strongest case possible within their institutions for new or sustained high-impact funding to Africa.
- Partner strategically with affinity groups and related colleagues in closely aligned issue areas to explore the intersection between philanthropic activities in those areas with philanthropy in support of African communities.
- Promote funding in support of African communities within the broader field of philanthropy as an urgent and compelling issue with many opportunities for lasting and meaningful change.

## **Goal II. Explore and educate funders on methods of effective funding and trends in current philanthropy to Africa.**

Objective: Increase funder transparency and information sharing about current funding initiatives (target areas, populations, goals and tactics) and assist Africa funders and the broader philanthropic sector in other ways to identify the nature, scope, and potential implications of Africa funding trends.

Strategies:

- Encourage AGAG members and other Africa funders to participate in existing resource tracking mechanisms to increase transparency and information sharing about current funding initiatives.
- Incorporate data, analysis, and information sharing on current Africa funding trends and practices into all AGAG briefings, meetings, webinars, calls and other knowledge and learning activities and into coordinated efforts with affinity groups and other philanthropy partners (Foundation Center, European Foundation Center, bi- and multilateral funders, etc.).
- Encourage robust and effective philanthropic responses to opportunities to support creative and positive efforts for change in African communities.

## **Goal III. Ensure AGAG's organizational sustainability, stability and sound management to successfully achieve its vision, mission, values and goals.**

Objective: Develop a strong value proposition message to support other objectives in membership growth, financial health, and robust member engagement and proactive participation.

Strategies:

- Craft an effective statement of AGAG's value proposition that includes narratives of the value of AGAG and its work and disseminate to Steering Committee members, current and potential AGAG members, partners and collaborators, the field of Africa grantmaking generally, and the broader field of philanthropy.
- Disseminate AGAG's value proposition message to a broadly defined audience using strategic communications methods carefully aligned with AGAG's membership, financial, and program objectives.
- Create and consistently use tools to gauge member satisfaction, solicit ideas, and encourage feedback to deepen the impact of AGAG's network, programs, and services.
- Create a robust and effective communications plan to provide rich and useful content with a clear message in a quality format to strategically targeted audiences.

Objective: Increase the size, scope, and diversity of AGAG membership within current membership criteria, and place special emphasis on under-represented funders such as family and corporate foundations and individual philanthropists.

Strategies:

- Assess strengths, weaknesses, and gaps in membership representation and in recruitment and retention practices.
- Create an annual membership development plan with specific goals and metrics on enhancement of AGAG membership.
- Design specific outreach efforts to engage lapsed AGAG members (if still engaging in Africa funding) and to recruit new Africa funders as AGAG members.
- Engage Steering Committee and members to facilitate and encourage peer-to-peer involvement in membership recruitment and retention.
- Ensure that enhanced the governance mechanism reflects the growing diversity of AGAG membership and the field of Africa philanthropy in the composition of the Steering Committee and staff.

Objective: Enhance the governance mechanism in support of 2014 – 2016 Strategic Refresh

Strategies:

- Design and implement a refreshed governance mechanism including an orientation process and leadership training to deepen the effectiveness of the Steering Committee on behalf of AGAG's work.
- Expand the diversity of funders represented on the Steering Committee.
- Introduce staggered term limits for Steering Committee members to ensure a healthy rotation of volunteer leadership and the broadest possible participation of Africa funders in AGAG leadership over time.
- Deepen and expand the role of the Steering Committee in membership recruitment.
- Develop a more articulated and effective role for Steering Committee members as ambassadors for AGAG.

Objective: Ensure sound financial management and the robust fiscal health of AGAG, including enhancing membership contributions and other revenue generating efforts.

### Strategies:

- Maintain current and appropriate financial controls, auditing procedures, and budgeting processes, including compliance with all Tides Center rules as well as all applicable state and federal regulations.
- Assess the strengths and weaknesses of the current revenue structure (membership dues, grants, and sponsorship/in-kind support).
- Design a plan for revenue enhancement (2014 – 2016) with specific goals and metrics.
- Explore new or underutilized revenue streams, specifically grants, sponsorships, registration fees, fee-for-service and in-kind support.
- Research and explore appropriateness of AGAG dues structure relative to other affinity groups dues structures and the viability and implications of dues adjustments for financial stability and sustainability.

### OUTCOMES

The achievement of these goals and objectives will result in the following outcomes:

- AGAG's value proposition is clearly understood by members, potential members, partners, stakeholders, and the broad field of philanthropy.
- Members support AGAG's mission and vision through proactively advocating for greater interest in Africa among their colleagues, peers, and the broader field of philanthropy.
- AGAG has been successful in cultivating an interest in funding in Africa among new and current funders.
- There is an increased sense of community among Africa funders including AGAG members and a deeper knowledge about partnership and collaboration opportunities.
- Overall membership is increased each year by 10% and the diversity of Africa funders is appropriately represented in the increase in corporate and family foundations, and individual philanthropists.
- Members have a clear understanding of how AGAG operates and are motivated to participate in activities relevant to their work with 40% participating in at least one activity in year one and increasing to 65% in year three of this plan.
- Members know how to take advantage of leadership opportunities within AGAG and there is a robust and steady pool of members who volunteer for the Steering Committee.
- AGAG has sufficient resources to accomplish this Strategic Refresh, diversified its revenue stream, and established a one-year operating reserve.

### **Appendix: Africa Grantmakers' Affinity Group - A History of Advancing the Field**

The Africa Grantmakers' Affinity Group (AGAG) has its roots in the South Africa Grantmakers' Affinity Group (SAGAG) an initiative led by the Kaiser Family Foundation in the 1980s in support of the anti-apartheid movement. As the devastating impact of apartheid throughout the region became more apparent in the 1990s, SAGAG expanded its mandate to include all of Southern Africa and changed its name to the Southern Africa Grantmakers' Affinity Group. It operated as an informal network and included foundations with a history of funding in South Africa, such as Carnegie Corporation, Ford, Kellogg, Mott and Rockefeller Foundations, and the Rockefeller Brothers Fund. These foundations funded civil society, legal, policy, and academic institutions working to challenge apartheid.

SAGAG galvanized philanthropic support for the anti-apartheid movement by recruiting new funders and encouraging greater foundation engagement in the region. Through its information,

convening and networking activities SAGAG helped to amplify the impact of U.S. philanthropy on change in South Africa. Its publications included a study of the non-profit sector in South Africa and *Hope At Last*, a funding guide for NGOs. In 1998 SAGAG organized the African Renaissance Conference co-sponsored with the Congressional Black Caucus.

As apartheid was dismantled, subsequent meetings were held to discuss the organization's future. At the April 2000 Council on Foundations Conference in Los Angeles SAGAG adopted a formal mission statement and changed its name to the Africa Grantmakers' Affinity Group (AGAG). The formation of AGAG signaled a more formal and expansive effort to keep the momentum of private philanthropy moving forward in even broader support of communities across the entire African continent.

AGAG became a project of the Tides Center in 2000. Under the leadership of a volunteer Steering Committee staff was hired and membership formalized. A strategic plan was developed to guide its work over the next five years and highlight the opportunities for funders to play a role in addressing the challenges facing African communities. The annual retreat became AGAG's signature event providing a consistent forum where funders built a strong sense of community while deepening their understanding of major trends in Africa and philanthropy's responses.

Filling the gap in resources to make the case for a new and sustained high impact focus on Africa, AGAG teamed up with the Council on Foundations in 2004 to publish the book, *Making A Difference in Africa*. Studies supported by AGAG members on funding trends in health and basic education in Africa and approaches to funding NGOs provided additional tools. Working strategically with member foundations and colleague philanthropy infrastructure groups, AGAG has provided leadership by advocating for increased and more effective funding and by sharing effective practices and strategic approaches across sectors and regions in Africa.

A milestone for AGAG was the 2008 conference and retreat in Johannesburg. These first-ever AGAG events on the continent included twenty-five African funders based in Africa. Both meetings brought together African, European, and North American grantmakers and focused on the need for more global partnership and deeper collaboration to address compelling issues and opportunities for lasting change in Africa.

Over the next five years AGAG membership and participation increased and diversified in geographic scope, sector interest, and approach. The reputation of the annual retreat grew as the place to connect with funders working in Africa and it attracted more African and European funders. Membership surveys revealed that both new and experienced staff viewed AGAG as an important and unique forum where they could learn about new trends and developments and form relationships that could lead to productive partnerships and collaborations. Through the annual retreats, publications, meetings, learning calls, individual consultations, and outreach, AGAG has continued to focus attention to changes in the landscapes in Africa and in philanthropy. The "Conversations With/Dialogues On" series has hosted discussions with knowledgeable speakers on timely topics relevant to the work of Africa funders.

Building upon its first decade of work, AGAG continues to keep the need for robust and focused funding in support of African communities on philanthropy's radar. Exciting positive changes in Africa offer greater opportunities than ever before for philanthropy to increase its impact and make important contributions to a world in which African communities achieve their full potential. With its rich history and solid reputation of advancing the field of philanthropy in support of Africa, AGAG is both committed and well positioned to continue its critical work.